

1600 Reporting

1601 Overview

The Division of Aging and Adult Services enforces the planning, coordination, evaluation, and reporting requirements established by the Older Americans Act and the Terms and Conditions of other grants, such as the State Health Insurance Assistance Program. The Division of Aging and Adult Services, through the Area Agencies on Aging collect statistical data and analyze the information regarding the effectiveness of program delivery. Data collected is then reported in systems such as the National Aging Program Information System and National Ombudsman Reporting System that serve as sources for performance and descriptive data.

This chapter provides an outline for the Division of Aging and Adult Services operational principles and procedures on reporting requirements for Area Agencies on Aging. The reports document the number of individuals who have received services, the demographics of the individuals receiving services, and the number of units provided to the aging population during the state fiscal year. **This policy chapter is subject to change as additional information and/or regulations are received from the U.S. Department of Health and Human Services, Administration on Aging.**

Reference: Older Americans Act of 1965, as Amended in 2000, P.L. 106-501, §306, §307 and §311; and Title 45 C.F.R. §1321.17 and §1321.65.

1602 Operational Principles

- 1602.1 Performance and descriptive data is collected as a means of measuring the effectiveness of Area Agencies on Aging in targeting services to older individuals with greatest economic need and older individuals with greatest social need, with particular attention to low-income minority individuals, older individuals residing in rural areas, low-income individuals, and frail individuals (including individuals with any physical or mental functional impairments).
- 1602.2 Area Agencies on Aging report on programs and services funded under the Older Americans Act and other funding sources through the Aging Information Management System (AIMS) or on forms containing information identified by the Aging and Adult Administration.
 - A) Client supported data are reported in the AIMS.
 - B) Non-client supported data are reported on forms identified in section 1603.

1603 Operational Procedures

- 1603.1 An Area Agency on Aging shall ensure data is collected for services funded under an approved Area Plan on Aging within its planning and service area.
- 1603.2 Unless otherwise approved by the Division of Aging and Adult Services, an Area Agency on Aging will utilize the following forms for programmatic reporting:

- A) Non-Medical Home and Community Based Services
 - 1) Congregate Meals Report – form AG-030A (Exhibit 1000A)
 - 2) Home Delivered Meals Report – form AG-030B (Exhibit 1000B)
 - 3) Social Services Report – form AG-031 (Exhibit 1000C)
- B) State Health Insurance Assistance Program
 - 1) State Health Insurance Assistance Program (SHIP) Client Contact Report (Exhibit 1000D)
 - 2) State Health Insurance Assistance Program (SHIP) Monthly Report (Exhibit 1000E)
 - 3) State Health Insurance Assistance Program (SHIP) Public and Media Activity Report (Exhibit 1000F)
- C) Long-Term Care Ombudsman Program
 - 1) Long-Term Care Ombudsman Program Facility Report (Exhibit 1000G)
 - 2) Long-Term Care Ombudsman Program Data Collection Report (Exhibit 1000H)
- D) Family Caregiver Support Program
 - 1) Family Caregiver Support Program Non-Client Supported Data Report (Exhibit 1000I)
 - 2) Family Caregiver Support Program **Quarterly** Summary Report (Exhibit 1000J)
- E) Legal Services Assistance Program
 - 1) Monthly Legal Services Report (Exhibit 1000K) in conjunction with the information collected in the report described in 1603.2.A.3.
- F) Mature Worker Program
 - 1) Mature Worker Program Monthly Performance Measures Report (Exhibit 1000L)
 - 2) Mature Worker Program **Quarterly** Summary Report (Exhibit 1000M)
- G) Program Development
 - 1) Annual report that details the progress of program development activities and accomplished program development activities by August of each year.

H) Area Plan on Aging

- 1) Action Plan/Management Plan on Area Plan on Aging 2004-2007 by August of each year.
- 2) Semi-annual progress reports on Area Plan on Aging 2008-2010 Action Plan.

I) Capacity Building

- 1) Quarterly progress reports on implementation status.

1603.3 Unless otherwise specified, reports identified in 1603.2 shall be completed and submitted to the Division of Aging and Adult Services by the 30th day of the month following the designated reporting period.

1603.4 An Area Agency on Aging may be required to submit reports in addition to those identified in 1603.2 as determined necessary by the Division of Aging and Adult Services.

EXHIBITS

1000A - Congregate Meal Report (AG-030A) and Instructions

1000B - Home Delivered Meal Report (AG-030B) and Instructions

1000C - Social Service Report (AG-031) and Instructions

1000D - SHIP Client Contact Form and Instructions

1000E - SHIP Report and Instructions

1000F - SHIP Public and Media Activity Form and Instructions

1000G - Ombudsman Program Facility Report and Instructions

1000H - Ombudsman Data Collection Form and Instructions

1000I - Family Caregiver Support Program Non-Client Supported Data and Instructions

1000J - Family Caregiver Support Program Quarterly Summary Report and Instruction

1000K - Legal Services Report and Instructions

1000L – Mature Worker Program Monthly Performance Measures Report and Instructions

1000M – Mature Worker Program Quarterly Summary Report and Instructions